



# A QUALITATIVE LOOK AT PARTICIPANT SERVICES

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- Using the assessment / IEP process to achieve results
- Integrating the assessment, training assignment and IEP processes

# **PART 1: THE PARTICIPANT ASSESSMENT PROCESS**



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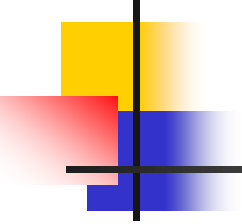
Strategies for Obtaining  
and Using  
Essential Information



# A good Assessment is crucial to meeting program goals

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- Provides the most effective framework for identifying “most in need” participants
- Establishes the IEP foundation
- Guides decisions on community service assignment, training goals and eventual placement and retention strategies

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- Orientation Starts the Process and Sets the Tone for the Duration of the Participant's Program Experience
    - Invest time in a clear, detailed orientation
    - Set high expectations from the very start
      - Be very clear about what you expect of applicants
      - This is the time for both parties to decide if the program is the right fit
    - Prepare applicants for the on-going assessment process
    - Stress IEP and Job Development aspects



# What To Cover

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- SCSEP program goals, activities, policies & procedures
- Obligation to seek unsubsidized employment, including applying for jobs at the host agency and registering with the One-Stop Center
- Individual Employment Plan (IEP) and revolving training assignment
- Participant training opportunities
- Host agency functions
- Community service training and hours
- Submission of timesheets, schedule and method of wage payment
- SCSEP participant meetings and workshops
- Recertification and obligation to report changes in income or family size

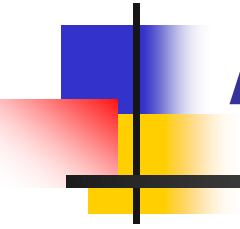


# Orientation (cont.)

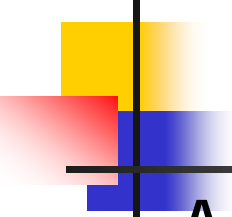
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- Confidentiality
- Nepotism
- Drug-free workplace
- Procedures for reporting assignment-related accidents
- Physical examination
- Travel as part of a training assignment
- Support services
- Limitations on political and religious activity
- Nondiscrimination Protections and copy of rights under the Age Discrimination in Employment Act of 1975
- Procedures for filing a complaint
- Termination policy
- Unsubsidized employment follow-up
- Participant customer satisfaction surveys
- Durational limit on program participation

# NOW TO THE ACTUAL ASSESSMENT



# Assessments should be:

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- A fluid process, not a one-time form...
    - allows you to see the total person and how they fit the training site and job goal
    - Is a continual process that ensures participants are trained for viable employment opportunities
  - Updated regularly
    - When new skills are achieved or barriers are overcome
    - At a minimum, twice annually

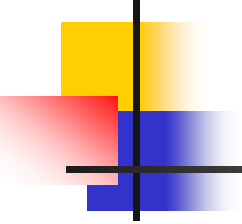




# Assessment

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- Provides information on:
  - Interests
  - Skills
  - Education/training
  - Work experience
  - Real and perceived barriers to employment

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- Provides the opportunity to analyze each applicant in terms of likelihood for contributing toward achievement of performance measures
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- Selection of appropriate applicants (regs. are clear that all applicants need not be selected)
  - Service level, most in need measures
- Success hinges on fit with the training site and job, as well as thoroughly identifying fit with barrier definitions



# How do host agencies fit in the process?

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## **Host agencies must:**

- Have assignments that reflect assessment results
- Support the participant's IEP

## **Assessments MUST be...**

- The basis for the IEP
- The basis for host agency assignment



# Minimum Requirements

DoL OW Bulletin 96-1

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- Made in partnership w/each participant
- Consider skills, talents, training, work history, and capabilities
- Identify appropriate training & employment objectives
- Identify needed supportive services
- Must be the basis for the IEP
- Must be the basis for host agency assignment
- Should be signed by participant & PD



# Two Types of Assessment Procedures

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1. Interviews, observations and documents ... used to get a feel for participant's work behavior and ambitions, and to determine most-in-need factors
2. Standardized measures designed to provide valid information on skills, interests, knowledge



# Primary Purposes of the Assessment Interview

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- Discover participant's expectations
  - Ask what the participant expects from the program
  - Clarify your purpose
- Seek early clues about where the participant wants to go
  - Uncertainty about job preferences
  - Strong preference for job/work environment
- Learn what the participant has done/will do to secure employment
- Discover & explore skills, abilities, limitations

# Organizing Assessment Information

[indicators for most-in-need factors]

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- Participant's background & work history
- Participant's work interests & goals
- Participant's skills, knowledge & abilities
- Participant's barriers to employment



# Participant's background & work history

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- What kind of jobs have they had in the past?
- What skills have they acquired from the jobs?
- What job related skills have they acquired from other past experiences?
- What possible barriers to employment are suggested by their background/work history?





# Participant's work interests & goals

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- What kind of work are they interested in at this point in their life?
- What goals can they and/or will they set for themselves?
- How do their skills, knowledge & abilities match their work interests?



# Participant's skills, knowledge & abilities

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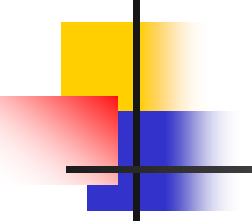
- What job related skills do they possess?
- What transferable skills might they have?
- What “hidden” skills/abilities haven't been considered?
- What is their ability to learn new skills?



# Participant's barriers to employment

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- What is their transportation situation?
- What supportive services might they need?
- Are they lacking any basic education?
  - English proficiency — Literacy — GED
- What skills do they need to obtain to qualify for the job they want?
- What is their transportation situation?

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- First interview may not initially reveal enough information to match host agency w/participant interests/skills
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- Testing, Paper & Pencil/Standardized Measures may benefit some (math, language), and should be used when there is:
  - participant lack of direction
  - question of the validity of participant's self-perception
  - concern about realistic perception of the participant
- Knowledge of local job market makes it easier to aid those long out of the market



# Basic Skill Measures

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- Adult Basic Learning Examination (ABLE)
- Comprehensive Adult Student Assessment System (CASAS)
- Cognitive Abilities Test (CogAT)
- Tests of Basic Education (TABE)
- Wide Range Achievement Test-Revised (WRAT-R)



# Skill, Aptitude, or Ability Measurements

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- Career Ability Placement Survey (CAPS)
- General Aptitude Test Battery (GATB)
- Realistic Assessment of Vocational Experiences (RAVE)



# Interest Inventories/ Temperament Measures

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- Career Values Card Sort
- Career Orientation Placement and Evaluation Survey (COPES)
- Career Orientation Preference System (COPS)
- Reading-Free Vocational Interest Inventory, Revised (RFVII)
- Strong-Campbell Interest Inventory (SCII)
- Self-Directed Search (SDS)
- USES Interest Inventory
- Jist Publications (assessment tools & workbooks)



[www.myskillsmyfuture.org](http://www.myskillsmyfuture.org)

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- Electronic assessment tool launched by DOL
- find and explore new occupations
- identify occupations that require skills and knowledge matching a current or previous job
- learn more about these suggested matches, locate local training programs
- From the homepage, enter the name of a current or previous job, and get a list of occupations related to that experience by O\*NET skill, knowledge and ability attributes

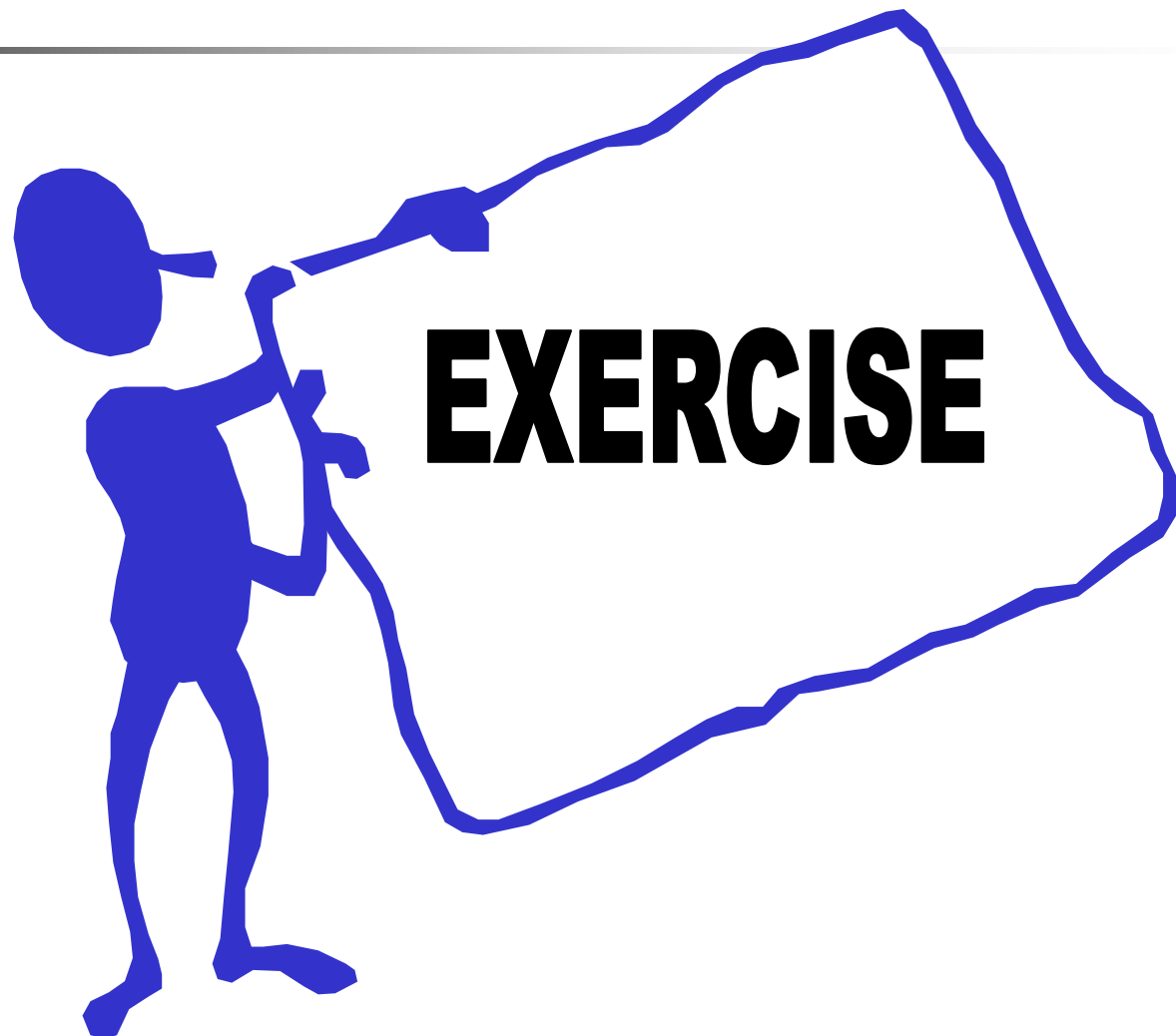
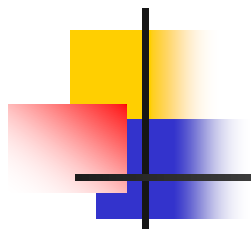


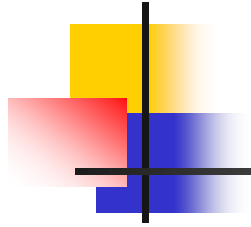


# O\*Net then allows you to:

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- Quickly compare the list of potential occupations;
- Get local job listings and salary information;
- Find occupational details, including job descriptions, tasks, tools and technology, etc.
- View a skills comparison in side-by-side charts;
- View and apply for job postings in their local area;
- Locate local training programs, including short-and long-term training programs at community colleges, four-year colleges and other educational institutions either by state or by ZIP code; and
- Find related licenses, certifications and apprenticeship programs.







# Elements of a Good Assessment Form

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- Face sheet summarizing:
  - Strengths (skills)
  - Barriers
  - Job preferences
  - Support service needs
  - Area to check & date if initial or 6-month update
  - Host agency assignment (s)
- Additional sheets:
  - Education, training, and work history
  - Probing questions with open-ended space
  - Checklists (skills, talents, aptitudes, hobbies, barriers to employment, job values, etc.)
- Signature lines and dates
- Acknowledgement statements

# **PART 2: INDIVIDUAL EMPLOYMENT PLANNING**



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The Key Tool  
of a  
Successful Program

# Individual Employment Planning



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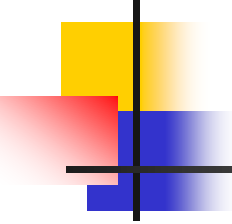
- The IEP is a succession of short-term plans that guide the participant's movement through the program
- While the assessment focuses on *information gathering*, the IEP focuses on *decision making*



# Linking Assessment Results To The Iep And Training Plan

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- Each builds on the information gathered in the assessment. The more comprehensive the assessment, the better the plan
- The assessment process helps you:
  - ask the right questions
  - collect the right information
  - provide the right guidance to help the participant create, decide upon and implement their IEP

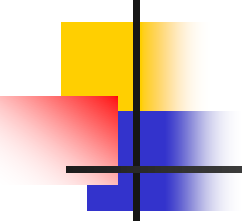


# General Rules...The IEP Should Contain:

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- A statement of what the participant hopes to gain from the program
- Ways of overcoming any barriers to employment as identified in the assessment
- Training needs
- More than one objective/action steps to achieve the job goal
- Appropriate community service assignments with rotation times
- Initial action steps with completion dates
- A statement by the participant that she/he agrees with the information and agrees to cooperate with the staff



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- Make each IEP specific enough to pass the *TRUCK TEST*
  - Relate every training activity to enhancement of a skill assessed as needed for employment
  - Set priorities for action steps
  - Clarify responsibility and consequences
    - Set dates to review progress and, if necessary, modify the plan



# Considerations When Writing An IEP

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- **Goals:** The goal of the initial IEP *MUST* be a specific employment situation (specific occupation or occupational category)
- **Objectives:** major milestones that must be achieved in order to attain the IEP goal
- **Services:** support or assistance that enables the participant to achieve an objective
- **Milestones:** interim steps that must be accomplished by the participant to achieve an objective...they are always specific, measurable, attainable, and time-driven



# SAMPLE

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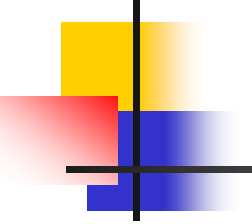
- **Goal:** "Commercial Truck Driver"
- **Objective:** "Attain Commercial Driver's License (CDL)"
- **Services:** "Attend truck driver school"
- **Milestones:** "enroll in truck driving school" ... "pay tuition" ... "purchase books" ... "take D.O.T. physical" ... and "pass driving test."



# Three Essential Questions For Career Planning

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- A well-structured IEP takes the participant through a process that enables him/her to learn the answer to all three questions.
  - Who am I? (this information comes directly from the assessment process)
  - Where am I going? (correlation of assessment information, labor market information, and occupational trends)
  - How will I get there? (lays out the process/roadmap)

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- Results of the interview and other assessments feed into initial training and employment goals and build the plan
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- Jointly interpret how these facts shape into a job goal ... ask:
  - What needs will a job fulfill?
  - What type of employment are you considering?
  - What do you want out of a job?
  - What type of occupation or job do you want?
  - When do you expect to be ready to apply for the type of job you want?



# To help with IEPs, staff need to know:

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- Current and potential host agencies
- Local job market, and qualifications for jobs
- Available training opportunities
- Basic education training locations
- Information on available social services



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# Analyzing the Local Job Market



# Linking to the IEP

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- Knowledge of the local job market makes it easier to aid participants who have been long removed from the workforce.
- Training and services in the IEP must enhance and improve the participant's skills, and lead to higher skills that will enhance employability

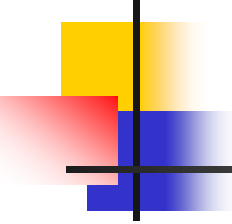




# Targeting Employers & Jobs

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- Program Goal: Participants placed in high growth jobs according to local labor market data
  - Demand-driven approach to training, job development and placement
- Targeted jobs should enable participants to become self-sufficient in positions for which they would not have otherwise had without the skill training provided by the program



# Training must be closely tied to needs of the local labor market to:

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- Ensure jobs will be available to trained participants ---and---
- Ensure training content provides participants with skills/knowledge needed to compete for available jobs



# Individual Employment Planning

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Ask yourself:

How well are your host agencies preparing participants to compete for available jobs?

- IEPs will not be effective if host agencies do not provide viable training and work experience opportunities
- Options:
  - Recruit new host agencies
  - Rotate to a better opportunity
  - Focus on specialized training contracts



# Incorporate Local Employer Data into Participant IEPs

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- Training/Position Descriptions should reflect skills to be learned at that host agency
- Use O-Net as a resource to lay out participant training plans / timing for accomplishing IEP action plans
- [www.careeronestop.org](http://www.careeronestop.org) also provides a good framework for IEPs and Host Agency training plans



# Information Sources .....

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- [Melissadata.com/lookups/index.htm](http://Melissadata.com/lookups/index.htm)
  - **Business Counts by ZIP**  
Get a list of business counts and SIC codes by ZIP Code
- **WWW. Rileyguide.com**
  - All things career development and job search
  - **Research & Target Employers & Locations**
  - How to Job Search, Before You Search, Career Research Center,  
Sites with Job Listings, Resumes & Cover Letters, Research & Target Employers, Network, Interview, & Negotiate  
Salary Guides



# ALSO EXPLORE:

Microsoft.com to determine software skills to learn ....  
Tutorials

- National Retail Foundation (industry-recognized customer services skills curriculum) [www.nrf.com/modules](http://www.nrf.com/modules)
  - Recruitment & Training Resources
  - [Career Opportunities](#) - access to general, online, and loss prevention retail career opportunities
  - [National Professional Certifications in Customer Service, Sales and Management](#) - professional credentials that validate skills and knowledge of potential applicants and existing retail workers
  - [NRF University wired](#) - delivering Internet-based learning for all retail professionals
  - [Retail Careers and Advancement](#) - online community for students, educators, and retailers to promote professionalism in retail careers
  - [Retail Skills Centers](#) - one-stop career centers that recruit, train, place and coach individuals in long-term retail careers and flexible job opportunities



<http://online.onetcenter.org/>

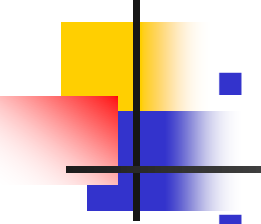
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- **Occupation-Specific Information**

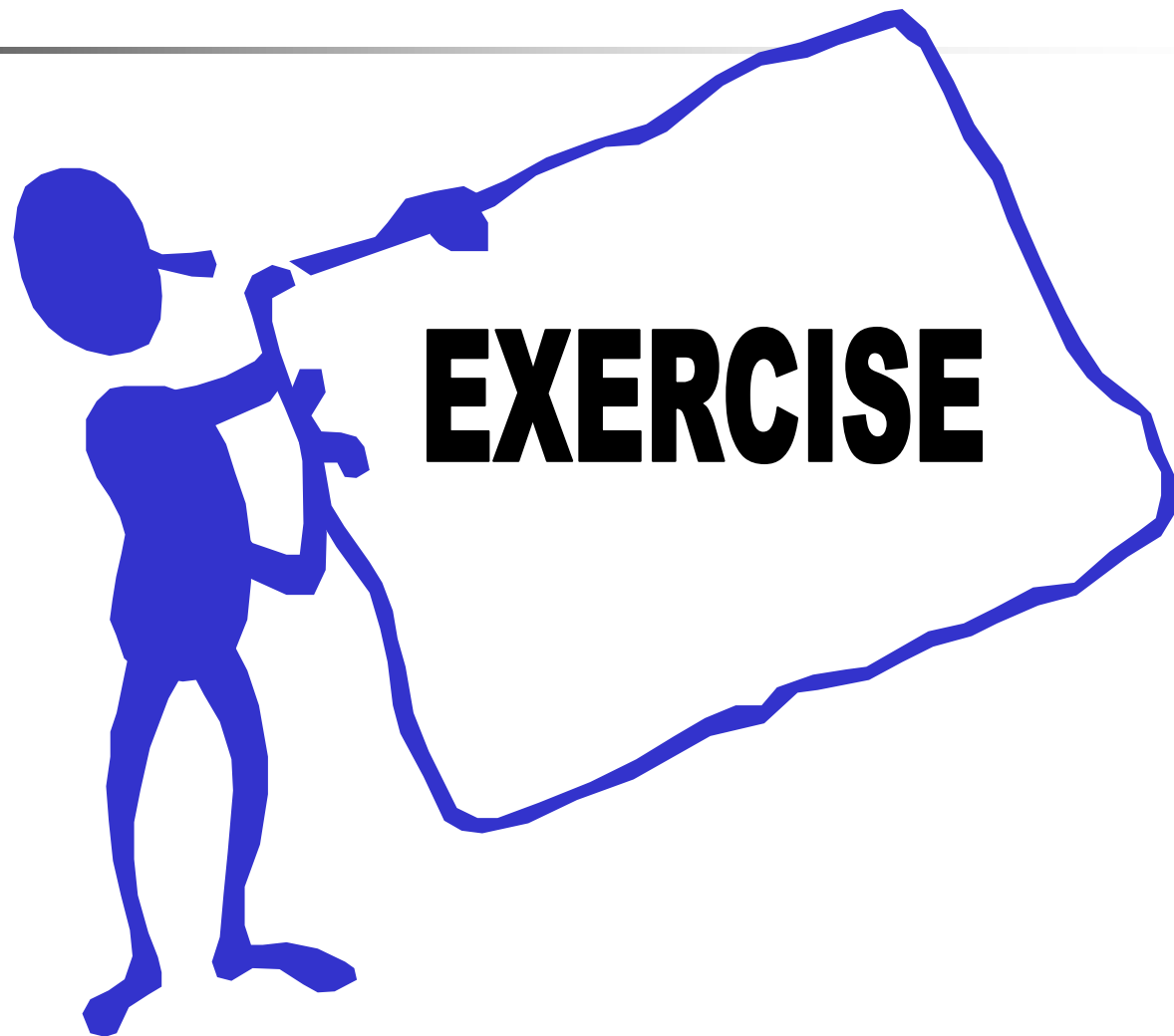
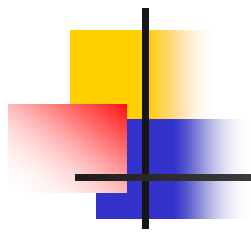
- Tasks — Occupation-Specific Tasks
- Task List — List of tasks for each occupation
- Tools and Technology — Machines, equipment, tools, software, and information technology workers may use for optimal functioning in a high performance workplace

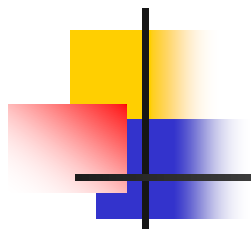
- **Workforce Characteristics**

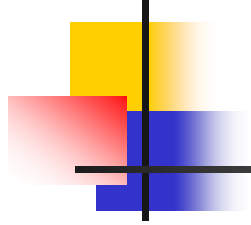
- Labor Market Information — Current labor force characteristics of occupations
- Occupational Statistics — Information related to economic conditions and labor force characteristics of occupations
- Occupational Outlook — Future labor force characteristics of occupations

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- **Education** — Prior educational experience required to perform in a job
  - **Experience and Training** required
  - **Basic Skills - Entry Requirement**
  - **Cross-Functional Skills - Entry Requirement**
  - **Licensing** —
  - **Occupational Requirements**
    - **Generalized Work Activities** — General types of job behaviors occurring on multiple jobs
    - **Detailed Work Activities** — Detailed types of job behaviors occurring on multiple jobs
    - Detailed Work Activities List — List of detailed work activities for each occupation
    - **Organizational Context** — Characteristics of the organization that influence how people do their work
    - **Work Context** — Physical and social factors that influence the nature of work









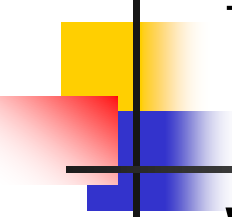
# Writing the IEP



# The IEP is a succession of short term plans that guides the participant's movement through the program

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- Write a series of specific, detailed plans for how the participant will accomplish what they must
  - Describe, in detail, each specific action they must take
  - Describe a measurable outcome for each specific action
  - Set a deadline for accomplishing each specific action
- Keep the plan short term – 3 months maximum is ideal

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- Begin with the first step(s) that must be taken to overcome barriers and reach goal
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- Will have several action plans, sometimes occurring simultaneous, sometimes phased in
  - basic education
  - skills training
  - job search
- Each of the barriers and tasks in the IEP can be broken down into action steps that are specific, achievable and measurable
  - Deadlines must be established for each action step
  - Participants must be monitored against the deadlines
  - Action steps must be in logical order



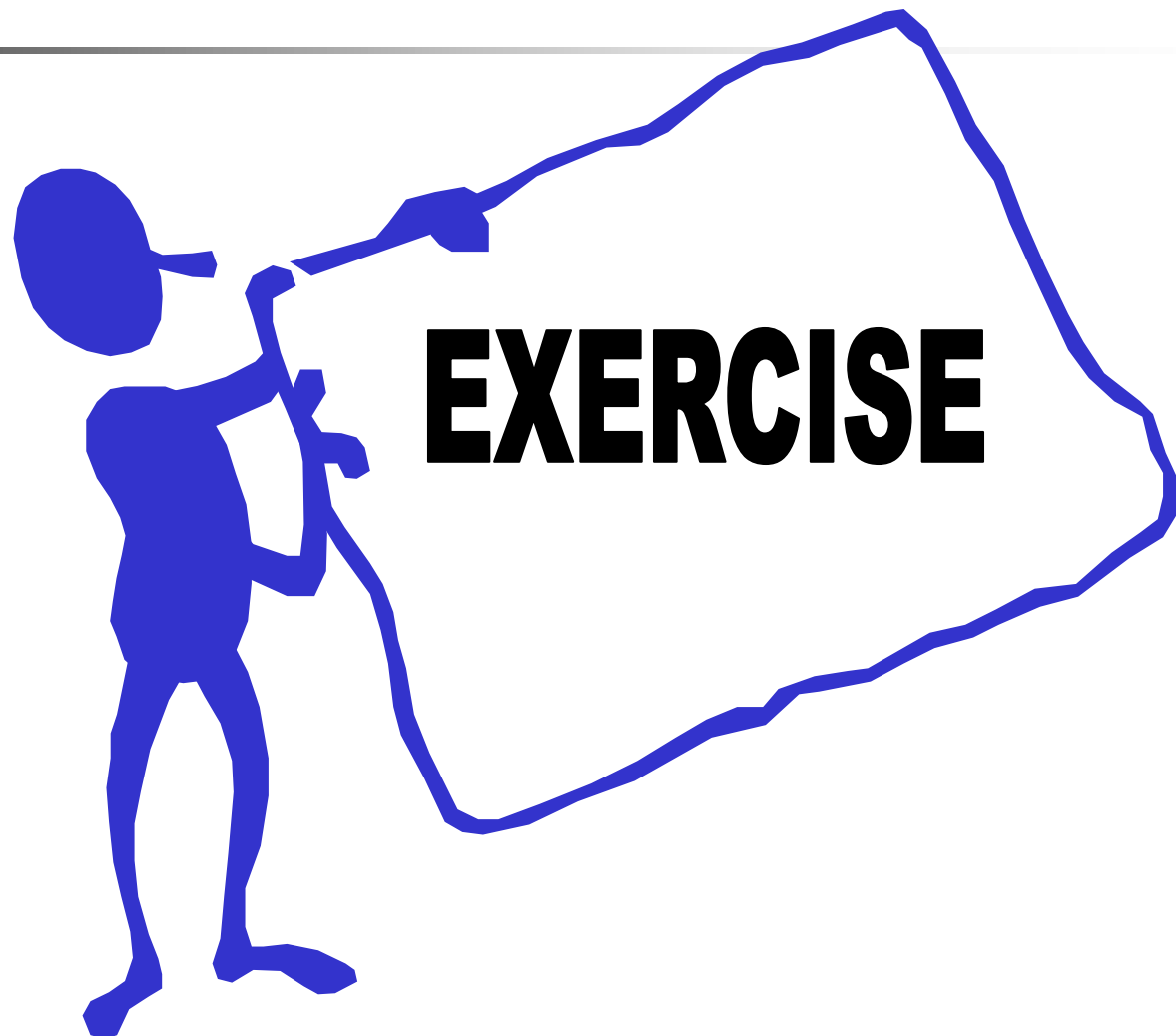
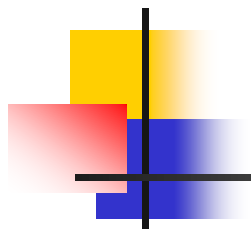
## Each action plan must be within the participant's reach

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- set participant up for success, not failure
- always focus on the next logical step for the participant
- do not have participant pursue goals/steps for which they are not yet qualified

Each action plan should help the participant focus on his/her ultimate goal

Action plans are meaningless without **specific dates** as deadlines





# Involve the training site supervisor in the IEP

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The supervisor:

- is often in the best position to be a “**coach**” to the participant
- provides on-the-job training at the training site
- can reinforce and help participant practice classroom training
- can assist with and coach participant’s job search





# Follow-up Procedures Are Essential

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- Determines whether the goals are still achievable
- Reveals if additional action steps or interventions are required



# Elements of a Good IEP Form

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- Face sheet summarizing:
  - Job goal (including desired location and time preferences)
  - Assessed training needs and barriers to achieving goal
  - Proposed training plan
- Subsequent sheets each covering:
  - Individual action steps to achieve new skills and/or eliminate personal barriers
  - Specific, measurable, completion dates
  - Open-ended space for progress/case notes; clear guidance for job developers
- Signature/date lines
- Acknowledgement statements